ChainLink Research 2015

Rental growth by sector

Figure 9: Real growth of retail sales and GDP consumption expenditure (%)
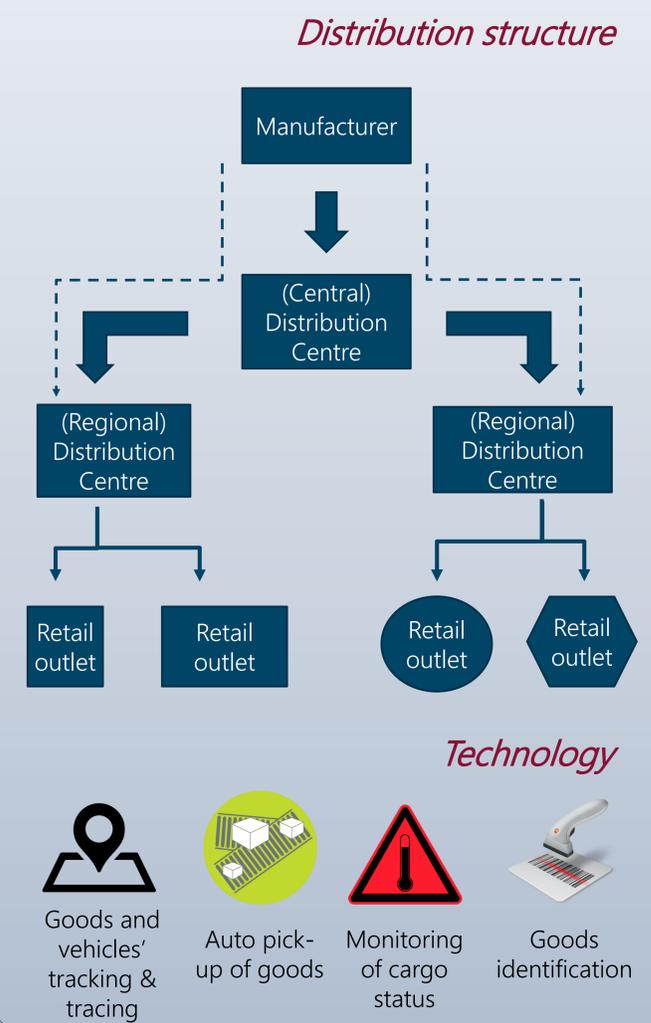
Source: CEIC, Barclays Capital

Urban retail logistics: key characteristics, innovations and trends

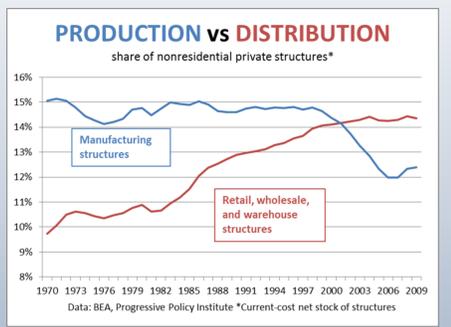Yari Borbon-Galvez, Konstantinos Papoutsis, Wouter Dewulf, Thierry Vanelslander

Key characteristics

Distribution structure

Technology

Goods and vehicles' tracking & tracing	Auto pick-up of goods	Monitoring of cargo status	Goods identification

Innovations

Retail logistics innovations	Retailers
Multi/Omni/Blurring Channel	7-Eleven
	Amazon
	Wal-Mart
	Carrefour
Cross docking	Metro
New distribution strategies	Lidl
	X5
	Wu-Mart
	Magnit
	Wal-Mart
Dark stores	Tesco
Xperience store	Apple
Pooling and collaborative warehousing	Wu-Mart
	Wal-Mart
	Tesco
	Carrefour
	7-Eleven
New store formats (pop-up, mobile, etc)	7-Eleven
	Wal-Mart
Tethering	Wal-Mart
Small Urban Stores	7-Eleven
	Wal-Mart
Web pick-up	Carrefour
	Walgreens
Advanced IT and systems	7-Eleven
	Metro
	Lidl
	Wal-Mart
	Emke
Warerooms	Ahold

Off-peak Deliveries	
Re-scheduled Time Windows	
New Distribution Strategies	
Electric Mobility	
Online Retailing	
Dark Stores	

Trends

Adoption of Quick Response → Restructured Logistics Systems → Increased Control over Secondary Distribution → Rationalization of Primary Distribution → Increased Return flow for Recycling/Reuse → Supply Chain Management & Efficient Consumer Response

Late 1980s — Late 2010s

PRODUCTION vs DISTRIBUTION
share of nonresidential private structures*

Manufacturing structures

Retail, wholesale, and warehouse structures

Data: BEA, Progressive Policy Institute *Current-cost net stock of structures

Business — Implications — Policy

- ✓ portrays dynamics and potential drivers of a key sector of the economy - cost structures could be identified;
- ✓ provides a sound basis with regards to the agility capacity of the retail industry;
- ✓ indicates similarities between different business sectors - lessons learned from a specific sector of the economy could feed the decision-making processes of other sectors;
- ✓ facilitates reorganization/restructuring of the distribution models of other economic sectors that interact with the retail industry.

- ✓ reveals the potential of industry's reflects to policy implementation → providing room for innovation development;
- ✓ investigates how industry could deal with the impacts of policy implementation;
- ✓ enriches policy agenda through the identification of innovative measures that enhance the business environment of the cities;
- ✓ supports efficient design of policies through the provision of useful insight regarding trends and policy-related drivers of economic transition.

Please feel free to add comments or advices by using a post-it or leave your business card!
Thank you for your attention!

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